




FORTI-COMPANION TO TECHNICAL SUPPORT



This document is aimed to be a one-stop guide to facilitate your service experience with Fortinet Technical Support. It should be used as a guideline only and is subject to change. Please refer to the CSS Reference Guide for detailed service descriptions.

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1. Global Technical Assistance Center Coverage

The Technical Assistance Center (TAC) is your single point of contact for post-sales service requests. Fortinet customer service is built on a unified, global process, providing 24 x 7 coverage, through centers located around the world delivering Customer Service and Technical Support expertise.



There are three regional Technical Assistance Centers which provide local geographical support.

Our **European Support Center** located in Sophia Antipolis provides support to Europe, the Middle East and Africa

Our **North American Support Center** located in Vancouver provides support to North, Central and South America and Canada

Our **APAC Support Center** located in Kuala Lumpur provides support to Asia Pacific, except China and Japan (which have additional in-country support groups)

Contacting your Regional TAC

To access the FortiCare Ticket database use your one-stop Support Services login at

<https://support.fortinet.com>

Telephone contact numbers for the Regional TACs:

North American Technical Support
Telephone: +1 866 648 4638 (Toll Free) or +1 408 486 7899

EMEA Technical Support
Telephone: +33 4 8987 0555

APAC Technical Support
Telephone: +60 3 2711 7391

2. Quick Guide to Customer Service and Technical Support Resources

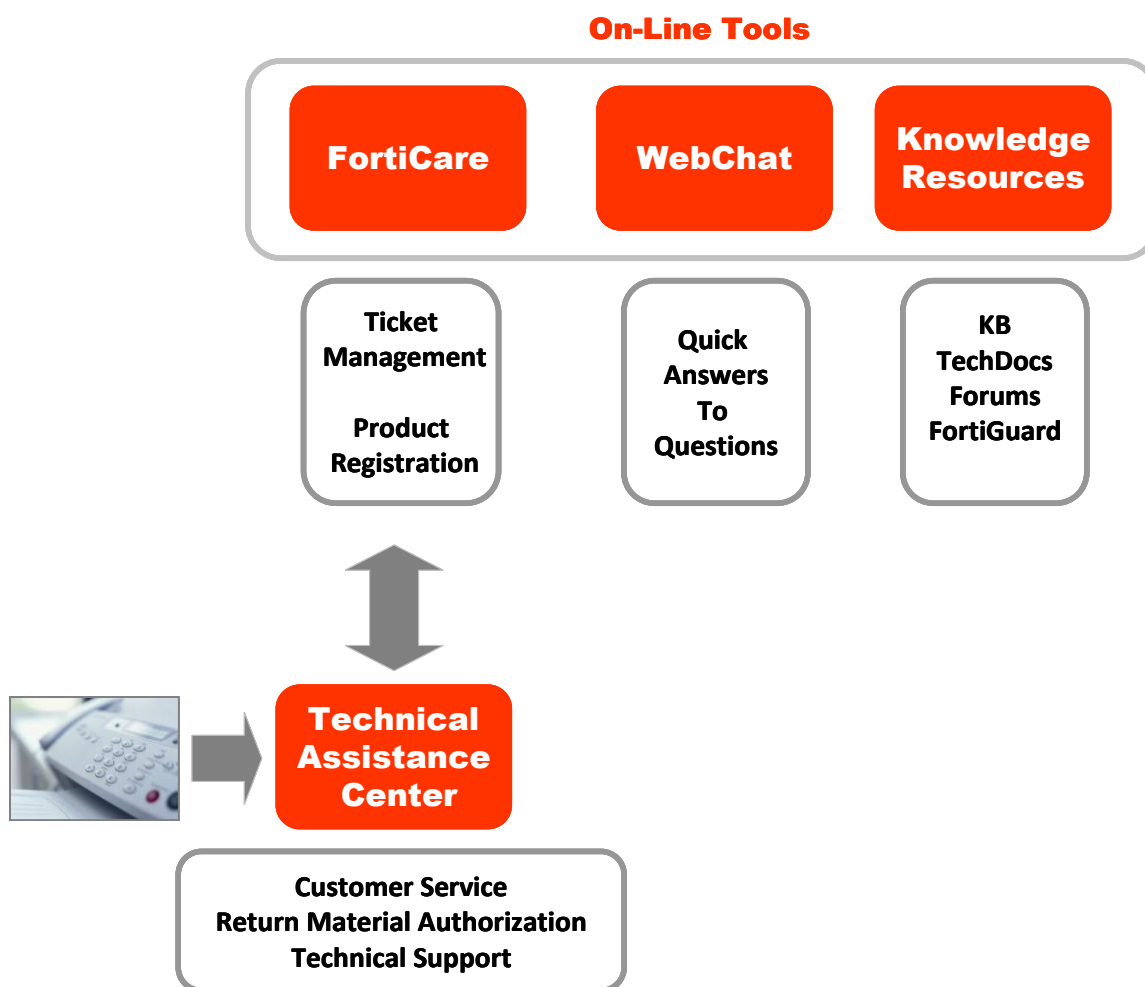
A variety of resources and tools are available which are designed to help you register, manage and maintain your Fortinet products.

Technical Assistance Center: Each Technical Assistance Center has four teams; Technical Support, Premium Services, Customer Service and Return Material Authorization (RMA). You can make contact either using the telephone or through the customer service web portal.

FortiCare: FortiCare is the customer service database through which you can manage the registration of products and log tickets related to Technical Support, RMA as well as contract entitlement. For technical support tickets the web interface can be used to log P3 and P4 tickets as well as track ongoing and closed tickets. All P1 and P2 technical tickets as well as Premium RMAs should be created via the telephone.

WebChat: Use WebChat to engage the TAC for quick responses to technical questions and customer service requests. If you have a complex issue we recommended creating a technical support ticket. To launch a WebChat session you need to be logged into the Customer Service web portal.

Knowledge Resources: Through the Fortinet web you have access to a range of technical information sources. There is a wide range of documentation, manuals, white papers as well as a searchable Knowledge Base with detailed technical articles. You can also access technical discussion forums which allow you to interface and discuss directly with other Fortinet users. There is in addition a dedicated web portal for information sources which relate to FortiGuard security services.



3. Quick Guide to <https://support.fortinet.com> your Customer Service Web Portal

The Customer Service Web portal provides a single interface to facilitate access to customer service and technical resources as well as the FortiCare ticketing and product registration database. Listed below are the key items available through each menu option.

Home > Customer Service & Support

CUSTOMER SERVICE & SUPPORT



Asset Management

- › [Register/Renew](#)
- › [Manage/View Products](#)
- › [View Account Services](#)

Use Asset Management to

- Register products or perform RMA replacements
- Verify and view product service entitlement
- You can also create tickets and launch WebChat through this option.



Assistance Center

- › [Create a Ticket](#)
- › [Search/View Tickets](#)
- › [Web Chat](#)

Use the Assistance Center to

- Create Tickets (RMA, CS, TS, DOA)
- View, search & produce ticket reports
- Launch a WebChat Session



Download

- › [FortiGuard Service Updates](#)
- › [Firmware Images](#)
- › [Firmware Image Checksums](#)
- › [Beta Program](#)

Use Download to

- Obtain FortiGuard Updates
- Obtain Firmware Images & Checksums (the checksum verifies the integrity of any image)
- Find information on the Beta Programs



Support Programs

- › [Support Offerings](#)
- › [Premium Support](#)
- › [Premium RMA](#)
- › [Professional Services](#)

Use Support Programs to

- Obtain information on FortiCare Service offerings



Tools & Resources

- › [Knowledge Base](#)
- › [Technical Documentation](#)
- › [Discussion Forums](#)
- › [Training & Certification](#)
- › [FortiGuard Blog](#)

Use Tools & Resources to

- Access on-line Technical Information
- Link to the Knowledge Base;
[RSS Feeds](#) can be configured within the KB page to obtain automated updates



FortiGuard Center

- › [Advisories & Reports](#)
- › [FortiGuard Services](#)
- › [Security Tools](#)
- › [Resource Library](#)
- › [Global Threat Levels](#)

Use the FortiGuard Center

- To link to FortiGuard information sources

4. Technical Ticket Priority Definitions and Guidelines

Priority	Fortinet Responsibilities	Customer Responsibilities	Examples
P1 Critical	Resources dedicated 24x7 until resolution or workaround in place	Designated resources available 24x7 who have the ability to provide the required information	Total loss or continuous instability of mission critical functionality in a live or production network environment
		Ability to provide all required and requested diagnostic information	Catastrophic impact to mission critical functionality impacting multiple active user sessions
		Once a workaround or a solution has been provided the ticket will be downgraded to P2 for root cause analysis	Critical traffic impact, major loss of connectivity or a vital security flaw impacting active business services
P2	Resources dedicated 8 x 5 until a resolution or workaround is in place	Designated resources available 8 x 5	Significant impact to mission critical functionality in a live or production network environment
		Ability to provide all required and requested diagnostic information in accordance with priority	Serious loss or frequent instabilities of mission critical functionality impacting active user sessions
			Loss of redundancy of a critical component impacting live business services
			A major security flaw has been identified
P3	Resources committed during normal business hours	Resources available during business hours to assist with troubleshooting	Issues in the network that are causing minimal impact to business operations
	Workaround to restore business operations to acceptable levels	Ability to provide all diagnostic information requested	Occasional or intermittent instabilities of core functions
			Limited traffic impact, loss of connectivity or a security exposure.
			Root cause analysis ongoing for a P1 or P2 ticket for which a workaround has been provided
P4	To investigate the issue and provide feedback on the resolution	To provide feedback to all information requested including qualification and diagnostic request	Information requests; regarding documentation or product
			Basic configuration assistance
			Minor defects identified in product

If you are experiencing a Priority issue telephone your Regional TAC.

Telephone your regional TAC to create a P1 or P2 ticket
Telephone or use the Customer Service web portal to create P3 and P4 tickets

5. Contacting Technical Support for Assistance

Before you contact Technical Support make sure to verify service entitlement within the customer service web portal. You can create a Technical Support ticket either through **Assistance Center** or **Asset Management** (by selecting the individual appliance).

Fortinet offers several options for obtaining technical support. The option you choose will depend on the severity of the problem and the type of support you need.

Technical Questions

If you have a technical question please visit our Knowledge Base which has a wealth of technical information which may be useful for your issue.

If you have verified the **Tools & Resources** section, but your question has not been resolved, then you also have the option of WebChat. This is appropriate for quick responses to questions, so if you have a complex issue we recommended creating a technical support ticket in FortiCare.

WebChat

To initiate a WebChat session choose either **Assistance Center** or **Asset Management** (by selecting the appliance). The availability of WebChat is dependant on your level of service entitlement, so for example, 8x5 customers may only access this service during local TAC business hours.

Each time you initiate a session you will be asked to complete a pre-registration form;

- Your First & Last Name
- Email Address
- Technical Description

Once you have completed the form you will be auto-directed to a Technical Support Engineer. It should be noted that Chat Sessions are not registered as trouble tickets within FortiCare, nor is each session systematically recorded, so you will need to take the appropriate actions if you want to save the information in your transaction.

If the problem is too complicated to resolve via Chat, the Technical Support Engineer will create a ticket for you and dispatch to your Regional TAC.

You will automatically be presented with a customer satisfaction survey at the conclusion of each chat session. Please take a few moments to complete this short survey. We value your feedback and use it to make improvements to our service. For additional information on providing feedback, please consult the "How do I provide feedback" section.

High Priority Issues

If you have a Priority 1 or Priority 2 issue as outlined in the priority definitions telephone your regional Technical Assistance Center. The telephone numbers are on Page 1 of this document and available on the web at;

http://www.fortinet.com/support/contact_support.html

Before you make the call ensure you have all the required technical data which should include the network configuration, the appliance configuration, logs and debugging data.

Creating Technical Tickets

Before opening a ticket make sure to have the following information available:

- Detailed Problem Definition
- Priority level and impact
- Relevant data such as configuration, log files and debug output
- If applicable a network diagram

Priority 3 and Priority 4 tickets are normally created within the support portal by using the **Assistance Center / Create Tickets** link. To create a ticket via this route, note the serial number of the product as you will be prompted for this information on ticket creation. Alternatively go through **Asset Management**, select the product for which you would like to create a support incident and choose a ticket type from the **Assistance Center** options at the left hand side of the screen.

To view, update or provide additional information to an existing ticket use the **Assistance Center / Search View Tickets** on the support home page. This option can also be used to filter your search and produce reports in XLS or CSV format.

If you have files to upload simply follow the instructions in the ticket for file attachments. Please note that the file-size limit for a FortiCare ticket is 4mb in total. If your files exceed this size you can still upload data using a temporary storage mechanism. Any files over the maximum will be available during the lifetime of the issue but will not be kept for future reference once the ticket is closed.

6. How can I expect my Technical Support ticket to be worked?

Fortinet provides communication guidelines for a timely initial response and transparency of the ticket resolution process.

The **Initial Response Time** = length of time before a qualified TAC representative contacts the customer.

The **Reporting Interval** = length of time between updates by the TAC Ticket Owner when a Fortinet action is pending.

Standard FortiCare SLA

Priority	Initial Response	Reporting Interval
P1	Less than 1 Hour	Every 6 hours
P2	Less than 1 Hour	Daily
P3	Next Business Day	Every 3 Business Days
P4	Next 2 Business Days	Weekly

If you are experiencing a P1 or P2 issue telephone your Regional TAC

Once a ticket is opened, a Technical Support Engineer from your Regional TAC will be assigned and start working on your issue in accordance with the appropriate SLA for your contract and ticket priority.

You can expect to receive an Initial Response either by telephone or email. Each time you receive an up-date this will be logged within the FortiCare database, and therefore viewable through the support portal.

Technical Support for tickets is provided by two levels of support within Fortinet. It may therefore occur that based on the nature and complexity of the issue your ticket will be escalated to the second level of support. If this takes place it will be clearly indicated.

To track the progress of tickets FortiCare utilizes a ticket status field. This will be visible to you via the FortiCare web interface. See Status Table Below.

Ticket Status Definitions

Description	Definition
Registered	A new ticket has been opened and is pending assignment.
Researching	The engineer is researching the technical data and will contact you to discuss their findings.
PendCustFB	The TAC has requested additional information to continue their analysis and is awaiting feedback. The action is with you.
RcvdCustFB	This is set automatically whenever you update the ticket, the action is with the TAC.
On Hold	You have agreed with the TAC to temporarily suspend the ticket resolution process. A commitment for a follow-up will have been agreed.
PendCloseConf	The TAC has provided a solution and is awaiting confirmation to close, if no response is received to this request within 5 days, the ticket will be automatically closed.
PendBugFix	A bug fix request has been submitted to Engineering.
WaitGARelease	A fix has been created and is awaiting incorporation into the next GA release.
Resolved-PendGA	A "Hot'fix" has been provided however the ticket remains open until this change is incorporated into the next GA release.
Solution Provided	A solution has been provided we are awaiting confirmation to close the ticket.
Closed	The problem is resolved and the ticket has been closed, a ticket can not be re-opened.

Working with Technical Support

If you wish to contact your ticket owner, you can either, telephone your Regional TAC, providing the ticket number or use the FortiCare Web interface to provide an update (including uploading configuration files).

TAC Engineer Activities

Once you have created a ticket the engineer will take the following actions:

- Begin troubleshooting the ticket and analyzing the data provided
- Provide an initial response
- Set the appropriate ticket status
- Provide you with updates on problem resolution

The engineer will focus on providing a resolution as well as providing a workaround to reduce the business impact. During the ticket resolution process, the Technical Support Engineer may:

- Suggest configuration changes
- Request access to the device
- Replicate the scenario in the lab
- Log a bug when root cause has been clearly identified as a software defect

Bug Resolution Process

Once a ticket solution has been isolated to a defect, the Technical Support engineer will open a Bug Report with the Engineering group. A Bug ID will be assigned and reported back to you in the ticket. Once the defect is resolved, it will typically be incorporated into the next maintenance release.

Closing the Ticket

The ticket resolution process requires constant communication and collaboration. To facilitate closure, Fortinet uses an automated mechanism to prompt for updates.

The FortiCare ticketing system will send weekly reminder emails when an action is pending. This process will continue for a period of 15 days, after which, the ticket will move to the status "Pending Close Confirmation". The ticket will be automatically closed if we have not received a response from your after 20 days.

If feedback is not possible within the notification period, you can request that the ticket be placed on hold. In this instance you should agree a commitment date with the TAC engineer to recommence the investigation.

Product Feature Requests

Requests for feature enhancements to product functionality should be directed to your Fortinet Sales team. If an issue is reported to the TAC that results in a feature request, you may use the reference number when contacting your sales representative.

How do I provide Feedback?

We value and appreciate your feedback so there are a number of mechanisms available to you.

Each time a ticket is closed an email will be sent with a URL linked to your ticket number. You will be asked to rate your satisfaction against a number of categories including;

- Effectiveness of Answer/Solution provided
- Technical ability/competence of the Support Engineer
- Timely response/resolution to your requests or issues
- What could we do to improve your support experience? (Free Format)

Each time a webchat session is terminated you will be presented with a form requesting your feedback on your support experience.

All survey responses are reviewed on a weekly basis by Fortinet TAC Management. *If, however, you wish to provide feedback* on any aspect of ticket handling including Customer Service, Technical Support and RMA Tickets, beyond the mechanisms above, you can send an email to CustomerCare@Fortinet.com which is a confidential email account monitored by TAC Customer Service Management representatives.

7. Replacing a Defective Unit (RMA)

Fortinet offers a variety of options for replacing defective hardware based on your business needs and the type of contract you purchase. If you have a technical ticket open and, the TAC engineer determines that replacement of one or more hardware components is necessary, they will automatically transfer ownership to the local RMA team.

If you believe you have a hardware failure, first consult the hardware troubleshooting page:

<http://emea.fortinet.net/fortinet/troubleShooting.php>

Please note;

- All requests for a Premium RMA service must be made by telephone.
- An RMA request is processed only after confirmation of the failure by a representative of the TAC.
- Fortinet is not responsible for charges incurred at customs, if you require in country RMA services verify with your local distributor.

Creating an RMA Ticket

To open an RMA ticket please ensure you have the following information available

- Serial number
- Description of the problem experienced with the unit
- Shipping and billing information
- Steps taken to confirm that the unit is faulty

Once the failure has been confirmed Fortinet will ship the RMA replacement product within the timescales appropriate for the level of service entitlement. You can view the status of your RMA by logging into the customer service web portal and checking the ticket.

On receipt of a replacement unit

Register the new device via the customer service web site, you have two options within the **Asset Management** menu;

- **Register/Renew:** When you enter the new serial number FortiCare will automatically recognize this as a replacement unit.
- **Manage Products:** Choose the Serial Number of the defective unit and once the product details are displayed, choose **Update / Serial Number (RMA Transfer)**.

For shipping information and RMA documentation please refer to

<http://emea.fortinet.net/fortinet/rma/index.php>.

Standard FortiCare RMA Options

Advanced Replacement

"We ship you a replacement, then you return the defective unit"

Fortinet aims to deliver a replacement unit from stock on the next Business Day after processing your request. The freight charges will be paid by Fortinet. You will have to send back the defective unit. A copy of the RMA form should be placed inside the box and the defective part and paperwork should be clearly marked together with the RMA number. We ask that you pay the return freight charges. The unit must be returned within 30 days, beyond that time Fortinet reserves the right to invoice for product.

Return & Repair

"You ship us the defective unit, we repair it, and, return it to you"

As soon as you receive confirmation that we have processed your request, you ship the defective unit to the repair facility indicated in the confirmation form. The defective unit should be packed in its original box. A copy of the RMA form should be placed inside the box and the defective part and paperwork should be clearly marked together with the RMA number. We ask that you pay the return freight charges. Fortinet will repair or replace the unit within 3 Business Days of receipt and return it to you, freight paid.

Dead on Arrival

"I received a new unit but it's not working"

A unit is classified as DOA (Dead on Arrival) if a defect is reported within the first 30 days of the Product Warranty. The warranty commences on the product registration date, and is no later than 120 days from shipment. Fortinet handles all DOA requests as Advanced Replacements, with next Business Day processing. Fortinet will bear the costs of shipment for both the return of the defective unit and the supply of the replacement unit for all incidents which have been classified by the TAC as a DOA.

For additional information on **Premium RMA** options please refer to
http://www.fortinet.com/support/FortiCare_support/premium_rma.html

8. Escalation Guidelines and Process

Fortinet implements an automated escalation process to notify and alert the Fortinet Management chain as time progresses. These notifications allow both Regional Management and Global Fortinet Leadership teams to be made aware of issues as they arise as well as ensuring executive sponsorship to drive action plans and resolution.

The Priority 1 times are measured in hours, 24 hours per day, 7 days per week. The remaining priorities correspond with standard business hours.

	Priority 1	Priority 2	Priority 3	Priority 4
TAC Manager	Immediately	Immediately	1 week	2 weeks
TAC Director	1 hours	4 hours	2 weeks	1 month
Country Manager	6 hours	1 Business Day	1 month	2 months
VP Support	6 hours	1 Business Day		
VP Sales	12 hours	2 Business days		
Fortinet CEO	24 hours	1 week		

The entry point into the escalation process is through your regional Technical Assistance Center. Make sure when you wish to escalate a ticket you have all the relevant information available, and each request for an escalation, should clearly include what actions you feel are required, including any significant dates or deadlines as well as any other evolving business impacts.

The escalation process within Fortinet is based on engaging the appropriate level of management, up to the Executive Level to ensure momentum of resolution by access to all appropriate resources. The focal point of contact for each business escalation is the Regional TAC Duty manager who is empowered to engage Executive resources within Fortinet to ensure the right resource is leveraged at the right time to resolve the situation. In addition, located within each Regional TAC are dedicated Escalation teams to ensure ownership of complex technical problems

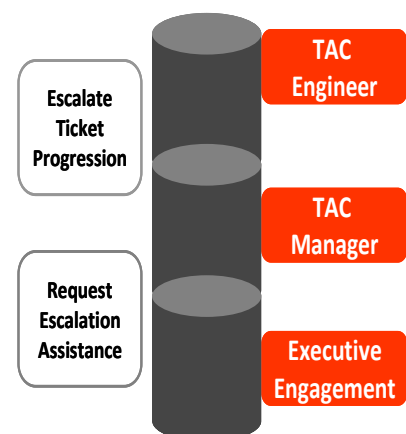
When do I escalate an open ticket?

Use this Escalation Process when you:

- wish to request transfer of an open ticket to the next level of support
- urgently need to communicate business issues to Fortinet management

Always document any business deadlines clearly in your request along with a statement of business impact, late communication may leave little time to research the root cause and develop the most effective solution. Complex problems take time to resolve.

Requesting escalation will ensure management attention on your ticket but may not change resolution time depending on the complexity of the issue, nor does it imply that the priority of the ticket will be increased.



If the business impact of an open ticket has changed – or was incorrectly set – at ticket opening you should consider requesting a change of priority rather than evoking the escalation process. A ticket escalated for business reasons will require both your own management and managers at Fortinet to become engaged, whereas, resetting the priority is a discussion that can be initiated at the ticket level with the Technical Support Engineer who owns responsibility for your issue resolution.

How do I escalate a ticket?

Requesting Escalation of Ticket Resolution Time

This is appropriate for situations where you require a quicker level of response than originally anticipated. The request should be accompanied by a business explanation and accompanying details.

You can initiate this request, by contacting your local Technical Assistance Center. The relevant ticket will be reviewed by technical support management to determine the most appropriate action, it is therefore imperative that precise information is provided when making your request.

Requesting a Business Escalation to Fortinet Support Management

This is appropriate for situations where there is significant impact to your business, examples are; a loss of business operations, critical roadblocks to, or a halted implementation plan, which could include firmware upgrades.

To initiate a management escalation, please ensure you have identified designated technical resources within your organization, to assist a Fortinet specialist with resolution of your ticket. We recommend taking the time to review the open ticket and update the information if required:

- Is the problem statement correct?
- Is the impact to your business or the risk to your implementation plan clearly documented?
- If there is a workaround, is the workaround impractical or inappropriate?
- If there is a business milestone date or an implementation milestone date, is the date clearly documented?

To initiate the process telephone your regional TAC and explain your request to escalate the ticket based on business needs. Please be prepared to provide a reason for the management escalation when making this request. Depending on your requirement and the urgency of your request the Customer Service representative will either connect you directly with the Regional TAC Duty Manager or provide an indication of the timescales for a response.

It may be that at this time you also wish to engage your local Sales representative. If you decide to do so ensure they have the ticket number so that they can effectively follow up with Fortinet Technical Support Management.

What can I expect during an escalated status?

As required, a technical plan of action will be co-developed to ensure resolution of the technical issue. The TAC Manager will update yourself and any other internal stakeholders including your account team and upper management of your ticket progression.

When is the escalation closed?

An escalation will be considered closed if one or more of the following are met:-

- agreed objectives have been achieved
- an agreed monitoring phase has passed without incident
- a workaround has been implemented and a final solution has been accepted
- an agreement has been reached to downgrade the ticket priority
- an agreement has been made for ticket closure

Appendix

FortiCare Contract Entitlement

FortiCare	Bundles	Default	Comprehensive 24x7	Enhanced 8x5
Privileged Web Access				
Online Documentation	24x7	First 90 Days 24x7	24x7	24x7
Product Registration & Contract Management	24x7	First 90 Days 24x7	24x7	24x7
Technical Support				
Phone	8x5 or 24x7	No	24x7	No*
Web	8x5 or 24x7	First 90 Days 8x5	8x5	8x5
Chat	8x5 or 24x7	First 90 Days 8x5	24x7	8x5
Software Support				
Maintenance and Feature Releases	24x7	First 90 Days 24x7	24x7	24x7

* With some exceptions in North America

Note: The Services provided here do not include installation services which may be purchased separately.

FortiClient Support Entitlement

FortiClient 4.1	Standard Edition Support	Premium Edition Support	
		Enhanced 24x7	Comprehensive 24x7
Software Support			
Support	Online Documentation	Online Documentation Web Support Chat Support Standard SLA	On-line Documentation Web Support Chat Support Phone Support Standard SLA

Premium Support Services Overview

With today's demanding operating requirements of your network, sometimes you need more than the best technology backed by a standard maintenance contract. Fortinet Premium Support Services focus on several areas to enhance the value you receive.

The Premium Service provides proactive service activity reporting, weekly, monthly or quarterly service reviews, dedicated support engineers and on-site maintenance visits. Our objective is to identify and eliminate issues before the problems arise, determine how to prevent a reoccurrence, and collaborate with our customers to build long-term relationships that ultimately deliver a more effective and efficient support experience. There are four major components of the Premium Services offering;

Technical Account Manager

The Premium Service is delivered by Technical Account Managers who are seasoned professionals with broad and deep experience in the security and networking arena. The Technical Account Manager (TAM) acts as the single point of contact and customer advocate within Fortinet, and is focused on building and maintaining a deep understanding of the customer business and their security requirements. The TAM is responsible for the quality of the service delivered by Fortinet, and works closely with the customer to ensure that all implementations are correctly aligned with the customer needs.

Account and Program Management

Through regular dialogues, the Technical Account Manager has the opportunity to better understand the customer application, networking and security environment. This knowledge information greatly facilitates more focused and effective support from both the TAM and the Fortinet support personnel with whom the information is shared. The customer is equally kept apprised of Fortinet product and service planning, providing the necessary information for dialogues that may influence future developments within Fortinet, and help drive strategic deployment projects within the customer context. Such projects may then be coordinated between Fortinet and the customer by the TAM.

Enhanced SLAs and Software Support

The subscription to the Premium Support Service benefits from enhanced Service Level Agreements (SLAs), to ensure accelerated resolution of support issues should they arise. In the situation where remedial actions are required, the Technical Account Manager works closely with the customer, and liaises with other Fortinet teams to ensure that appropriate resources are engaged. The team also manages technical escalations within Fortinet on behalf of the customer. Gold Premium Support customers are entitled to extended support on software versions and special builds of software, this includes technical support and bug fixes. This service effectively extends the software support life time as detailed in the Fortinet Life Cycle policy.

Communications and Reporting

The Premium Support service provides regular status reports on remedial tickets. Such reports include details of active issues, a summary of the communications between the customer and Fortinet, contacts involved in the tickets, and the steps taken to resolve problems and/or subsequent action plans.

In addition to the reports, the Technical Account Manager proactively communicates to the customer on a variety of subjects, including ticket reviews, and future release information on new products, services or capabilities.

The Premium Support Service is offered in three packages, Premium Support, Premium Support Gold and Premium Support Global Gold, each offering a different level of service. All these services are offered in addition to, and not bound to the conditions of the standard FortiCare maintenance contracts, that are applied to the hardware and software of the Fortinet products.

If you would like further information on this Service please contact your local Sales representative.



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